



2007 Evaluation Initiatives

Bottom line: Several items and areas within the US Army's Evaluation Systems are being updated in this year and should be of interest to any one who is:

- a rated officer or NCO
- a rating official
- a person who manages or supports an evaluation system

Purpose: This presentation provides information on the upcoming changes and recommendations for critical areas when managing an effective unit evaluation systems.

Evaluation System Initiatives –

part 1

- OER by e-mail for deployed units
 - used since Apr 03, expanded, and now restricted to only units deployed into (or supporting) theater
 - functional; but, should be used only as necessary (not reliable)
 - requires user to be authorized and to double check that reports arrive and complete processing
- Electronic Evaluations
 - incorporated into AR 623-3 and DA PAM 623-3
 - uses wizard forms with CAC signatures (no special authorizations)
 - content transfers from support forms to final evaluations
 - tracking and management info available with “My Forms” on AKO
 - electronic submissions to HRC using “My Forms” on AKO

(more on these points later)

Goals: 100% accountability and accuracy, speed through the system, one Army standard and a single point of

Evaluation System Initiatives – part 2

- Single OER Senior Rater Profile (expected May to Aug 07)
 - after (date) senior rater profiles will be separated by rank only
 - OER received before (date) will profile using 3 separate profiles for each rated officer rank; OER received after (date) will profile using 1 profile for each rated officer rank
 - requires no close out OER or profile restarts
 - options provided to senior raters who, as a result of combined profiles, are in a misfire percentage situation
 - after (date) all OER will be submitted to HRC Alexandria.
 - AKO My Forms submissions will open for USAR and ARNG to HRC Alexandria
 - originals (paper copies) will be sent to: USA HRC, ATTN: AHRC-MSE-R (Room 5S67), 200 Stovall St Alexandria VA 22332-0442
 - after (date) all OER, NCOER, & AER will be required at HRC within 90 days after the THRU date on the report. This synchronizes 5 requirements to 1
 - Interactive Web Response System (IWRS) and SR Profile Online will reflect

Goals: 100% accountability and accuracy, speed through the system, one Army standard and a single point of access

Evaluation System Initiatives –

part 3

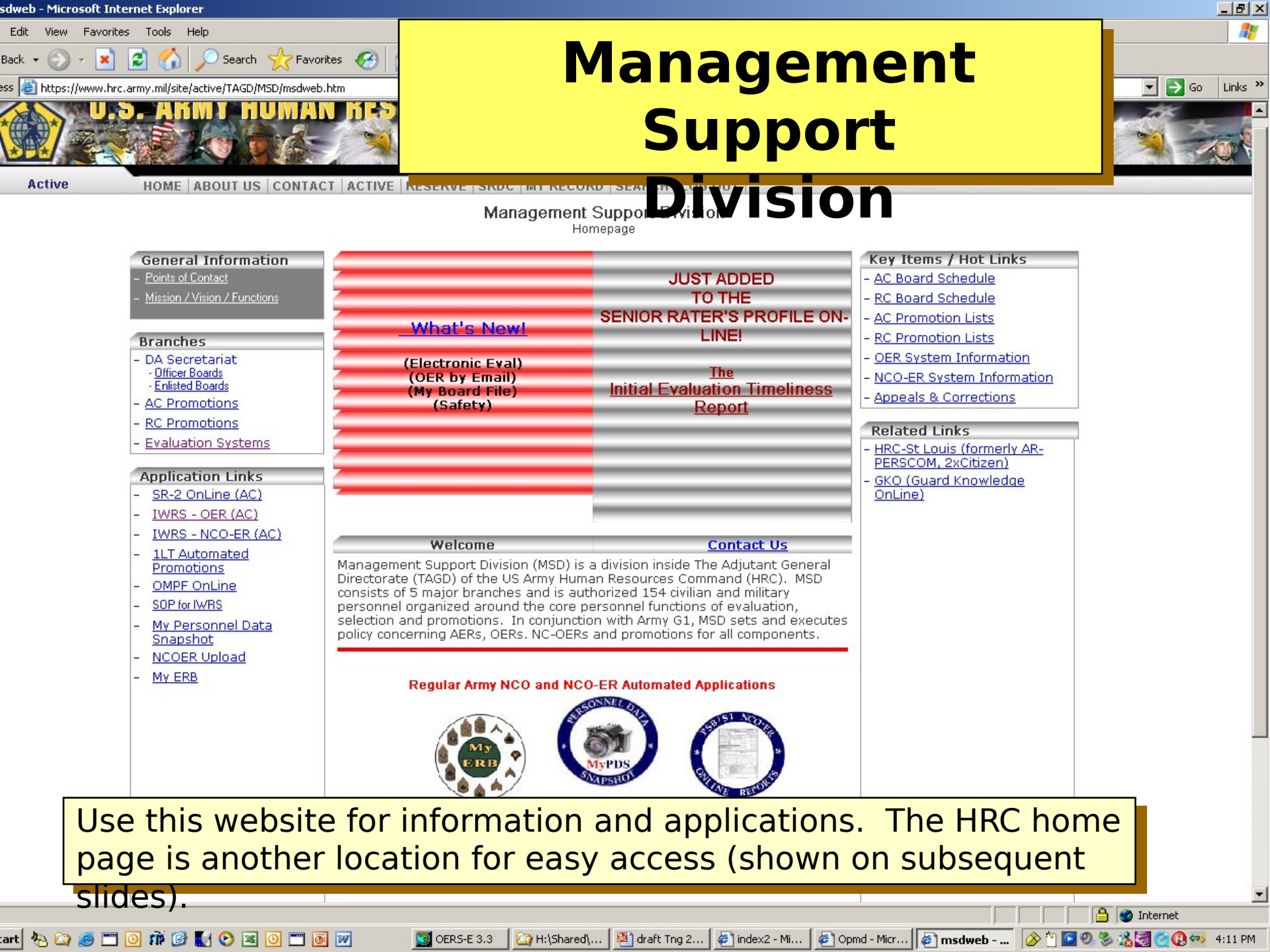
- Evaluation Timeliness Report
 - tracks OER received at HRC after 1 Jun 07 and NCOER received at HRC after 1 Oct 07 and ties submissions to individual senior raters
 - senior raters can view their report in the online application for senior rater profiles
 - currently, only active OER are reflected in this tool but USAR and ARNG OER information will be included on (date); see below for NCOER information
 - IWRS will be updated to provide better consolidated reports to units
 - DCS, G-1 is authorized to post this report, if necessary, in senior rater's
- Single Evaluation Processing System (expected Aug-Sep 07)
 - by Sep 07 (expected) all NCOER (except ARNG) will be sent to HRC Alexandria
 - by Sep 07 AKO My Forms submission will open for USAR and Active NCOER (if it is already functioning the delivery point will switch to Alexandria)
 - by Sep 07 originals (paper copies) will be sent to: USA HRC, ATTN: AHRC-MSE-R (room 5S67), 200 Stovall St Alexandria VA 22332-0442
 - IWRS reports and Eval Timeliness Reports will reflect NCOER information for RA and USAR. ARNG NCOER remain at State level for processing to OMPF.
 - NCO senior raters will be able to access SR Profile Online to obtain their

Goals: 100% accountability and accuracy, speed through the system, one Army standard and a single point of access

Evaluation System Initiatives – part 4

- AR 623-3 and DA PAM 623-3 updates
 - expect an update in the May-Jun 07 timeframe that incorporates the single OER senior rater profile and Evaluation Timeliness Report initiatives and administrative error fixes
 - expect a short staffing and another update in Aug-Sep 07 timeframe with the changes needed for single point of submission for all reports and other requirements
 - the Aug-Sep 07 regulation should include items such as:
 - requirement to include deployability status (personal and subordinates) as part of the counseling process (similar to that required for safety)
 - revised chapters for USAR and ARNG showing only those items that are different
 - submission of NCOER to HRC Alexandria (vice Indianapolis and St Louis)
 - improved presentation of information for AER processing
 - anything else you suggest or we can get in there...

Goals: 100% accountability and accuracy, speed through the system, one Army standard and a single point of access



Management Support Division

Management Support Division
Homepage

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Branches

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Application Links

- [SR-2 OnLine \(AC\)](#)
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- [OMPF OnLine](#)
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- [My ERB](#)

What's New!

(Electronic Eval)
(OER by Email)
(My Board File)
(Safety)

**JUST ADDED
TO THE
SENIOR RATER'S PROFILE ON-
LINE!**

**The
Initial Evaluation Timeliness
Report**

Key Items / Hot Links

- [AC Board Schedule](#)
- [RC Board Schedule](#)
- [AC Promotion Lists](#)
- [RC Promotion Lists](#)
- [OER System Information](#)
- [NCO-ER System Information](#)
- [Appeals & Corrections](#)

Related Links

- [HRC-St Louis \(formerly AR-PERSCOM, 2xCitizen\)](#)
- [GKO \(Guard Knowledge OnLine\)](#)

Welcome

[Contact Us](#)

Management Support Division (MSD) is a division inside The Adjutant General Directorate (TAGD) of the US Army Human Resources Command (HRC). MSD consists of 5 major branches and is authorized 154 civilian and military personnel organized around the core personnel functions of evaluation, selection and promotions. In conjunction with Army G1, MSD sets and executes policy concerning AERs, OERs, NC-OERs and promotions for all components.

Regular Army NCO and NCO-ER Automated Applications



Use this website for information and applications. The HRC home page is another location for easy access (shown on subsequent slides).

These slides do not cover:

1. AER. Note: We mention them here and they are available in My Forms and in electronic ATRRS (which is neat); but, we need a different training package to explain these forms.
2. How to fill out evaluations. Note: See DA PAM 623-3 or use forms wizards.
3. Interaction with DIMHRS. Note: Will be covered in the future but by executing the processes outlined here gets you ready for DIMHRS.
4. Basic evaluation rules. Note: Specific policy and processing information can be found the AR 623-3 and DA PAM 623-3 and on our website. For matters of brevity in this presentation I made the assumption that you know the basic rules surrounding OER and NCOER.
5. Additional help on any of your evaluation topics, specifically on ~~these topics can be found at our website~~

We'll move on to managing an evaluation system and the important elements that need attention ...

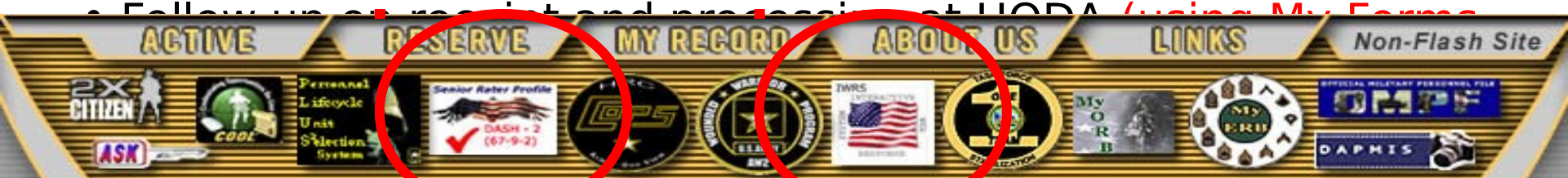
Key Elements for Effective Evaluation Systems

Goal: develop and assess Soldiers; submit reports on time.

Senior Rater's Role - do or ensure:

- Ensure rating schemes are known by Soldiers
- Oversee counseling; participate in counseling
- Use tools & My Forms (red outlines)
- Know current THRU dates of reports on file
- Anticipate and project "next" evals.
 - Current thru date on file plus 12 months or known changes of rater.
 - Complete the record dates for those being considered by a selection.
- Notify rating officials of upcoming evaluations
- Track rating officials completion of reports (use My Forms)
- Follow up on report and processing at HQDA (using My Forms)

Form Name	Form Type	Routed User	Action Date
NCOER SFC Brady 2 0060425	TF 2166-8	chelsea.ortiz	May 09, 2006 01:36:02 GMT
NCOER SPT Form Ne Ison	TF 2166-8-1	karen.scherer	May 10, 2006 17:52:09 GMT
ORTIZ Support For m 20060412	TF 67-9-1	karen.scherer	May 08, 2006 19:56:20 GMT
PERSONNEL QUALIFICATION RECORD-P...	DA 2-1	jan.swicord	May 22, 2006 21:54:20 GMT
test 3	DA 4591	jan.swicord	May 16, 2006 20:51:09 GMT
Test 4	DA 4591	jan.swicord	May 22, 2006 21:56:19 GMT
Test 6	DA 5006	jan.swicord	May 22, 2006 21:55:50 GMT

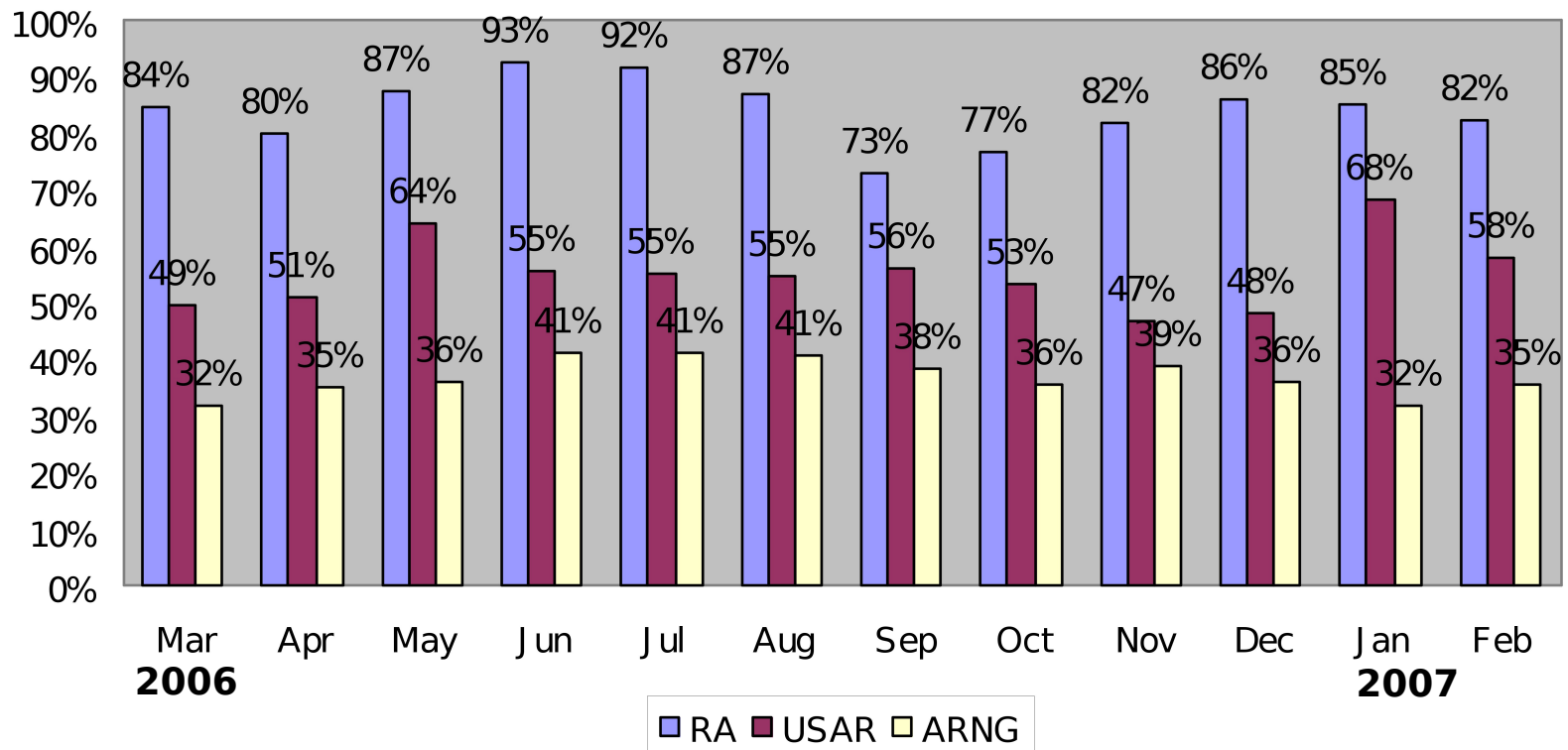


Reason behind an interest in late submissions ...

This chart reflects how units submit OER based on date of receipt at HQDA.

Goal: 95% or greater received at HQDA on time

Chart reflects on time within 90 days for AC and 120 days for USAR & ARNG.



But more than just a late report ...

1. Timely submission of evaluation reports is a measurable indicator of how well the Army (and an individual senior rater) is fulfilling its responsibilities in taking care of and developing subordinates.
2. Evaluation systems provide information to both rated Soldiers and to selection boards & career managers. Reports are a critical element in the process of selecting and assigning leaders for the future.

The process of preparing and completing an evaluation does not have to be difficult if you follow AR 623-3 intent and use available tools:

- an evaluation report (OER or NCOER) is the final product
- an evaluation report is an assessment on the rated Soldier's performance and potential made by designated and authorized rating officials
- an evaluation period and its derived benefits start with, and continue throughout, counseling and leader development
- IWRS information and My Forms help the preparation

process

Bde S1 Role (an example)

- Manage BDE evaluations program
 - Establish rating schemes for commander
 - Anticipate unscheduled evaluations
 - Assist BDE Cdr in evaluation system management (particularly SR Rater Profiles)
 - Quality control all evaluations (with CSM/SGM for NCOER)
 - Manage (oversite at least) submissions to HRC
- Educate the populations population
 - BN S1s
 - Supervisors (rating officials)
 - BDE Cdr
 - Rated Soldiers

Bottom line: Staying out of trouble in the evaluation business as an S1/HR Manager

1. Keep and maintain rating schemes.
 - Note promotions, job changes, incoming, departing
 - Use online tools to track & project the “next report”
2. Keep commanders/senior raters involved; it’s their system.
 - They develop and effectively communicate a rating philosophy
 - They focus on proactive actions (counseling, development)
3. Use My Forms processes, forms, and signatures as intended
 - Start with support forms and transfer to evaluations
 - Never make shells. If you must: create a support form shell
 - Route forms behind AKO and always use the wizard to add content (deviations from this process work but raise risk of problems)
4. Don’t sign, or have Soldiers sign, blank forms (becoming obsolete but still a problem)
5. Don’t present “false information” on reports.
 - Individual reports are snapshots in time.
 - Every action has an impact (whether you see it or not)
 - 2d and 3rd order impacts are ones that come back to bite you.
6. Call and ask for guidance if you run into odd situations.

Getting information about reports ...

1. The Interactive Web Response System (IWRS) is an online tool which provides administrative information in a variety of reports on AC OER. It will expand to reflect all received OER and NCOER (except ARNG NCOER).
2. A detailed SOP showing each of the reports and potential uses is available upon request from ESO.
3. We update reports regularly. The next set will:
 - reflect last eval THRU date on file by PSB/UA Code (vice just UIC)

Interactive Web Response System

Information
The Interactive Web Response System (IWRS) is reflecting data on Evaluations received at OER Branch up to **20070411**.

IWRS will allow rating officials and administrative personnel to view select information on all performance reports.

The reports are sorted by day of receipt at HQDA, not report thru dates.

LINKS
[IWRS](#)
[OER Late Report BY PSB/UA](#)
[Delinquent Report BY PSB/UA](#)
[Display By UIC](#)
[Daily Transfer Report](#)
[Senior Rater Report Status](#)

SSN:

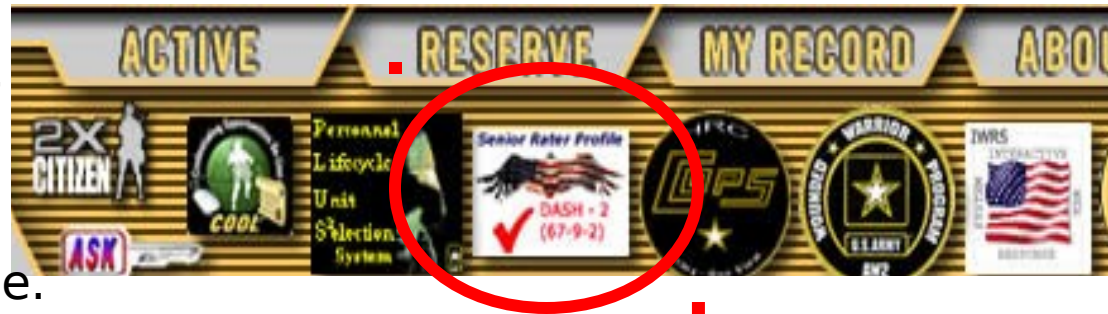
Directions:
To display information (Rated Officer's Name, SSN, Grade, From Date, Thru Date) on OER/AER received at HRC, please enter SSN and click on submit.

Disclaimer: This report is supported by Microsoft Internet Explorer Version 5.X and above with High Encryption Pack for Secure Sockets Layer (128-bit) encryption. It is only supported by Netscape Version 6.1 and above. Please upgrade your browser if necessary to view the features of this site. For optimum presentation, a screen area resolution setting of 1024 x 768 pixels is recommended.

Philosophy for reports in this system: give as much detail as possible to be helpful but without compromising privacy or personal information.

Points for Profile Managers ...

1. Obtain a copy of the current profile status (either on line from senior rater or requested from ESO.) This becomes the base line profile.



(Validate the profile, if needed, after the transition period to consolidated profiles.)

2. Accurately track all submitted reports into HRC and watch for those returned for correction. Reports profile based on received date at HRC. Reports returned for correction may not be “received” yet.
3. Project report “opportunities” due to annual requirements, changes of rater, or complete the record or other optional reports. (see slide of profile plan)
4. Review senior rater assessments regularly to test rating philosophy with current population and profile status.
5. Don't forget the Soldier evaluations which do not have a profiled box check. Include these Soldiers in the senior rater philosophy and tracking systems. A detailed assessment and timely preparation and submission of those reports is critical to Army success also (both

Senior Rater Profile Report: DA FORM 67-9-2

SENIOR RATER PROFILE REPORT OFFICER EVALUATION REPORTING SYSTEM FOR USE OF THIS FORM, SEE AR 623-3; PROPONENT AGENCY IS DCS, G-1								
A. NAME		B. SSN		C. RANK		D. DATE OF REPORT		
CURRENT OER PROFILE					PROFILE HISTORY			
	ACOM COM	COM	BCOM RETAIN	BCOM DO NOT RETAIN	Total Ratings	Total Ratings	1st Block COM	% Total 1st Block
MG	Do Not Receive block VIIb. Box Check							
BG								
COL								
LTC								
MAJ								
CPT	Do Not Receive block VIIb. Box Check							
1LT	Do Not Receive block VIIb. Box Check							
2LT	Do Not Receive block VIIb. Box Check							
CW5	Do Not Receive block VIIb. Box Check							
CW4								
CW3								
CW2	Do Not Receive block VIIb. Box Check							
WO1	Do Not Receive block VIIb. Box Check							

DA FORM 67-9-2 15 May 06

The 3 profiles combine into 1 on (date).
At that time the Active location becomes
the point to access all OER information.

**3 separate profiles based on
rated officers component:
(1) Active; (2) USAR; (3) ARNG**

To obtain a copy of:

Active & USAR profiles:

Email: tapcmse@conus.army.mil

Online: www.hrc.army.mil (HRC-Alexandria)

**ARNG profile: National Guard Bureau
(703) 607-7111; DSN 327-7111**

Email: clyde.rebeiro@ngb.army.mil

Online: gko.ngb.army.mil
(need GKO password to access)

Profile Consolidation Examples (1)

- Senior Raters (SR) with profiles on officers in only one component will not be affected. SR will comply with consolidated procedures (i.e., AKO My Forms use, Alexandria address for submissions, within 90 day from THRU date, and visibility in IWRS and SR Profile online).
- Senior Raters with profiles on officers in more than one component will have their existing profiles combined into one. SR will comply with consolidated procedures (i.e., AKO My Forms use, Alexandria address for submissions, within 90 day from THRU date, and visibility in IWRS and SR Profile online).

- An example follows:

Prior to consolidation

SR has 3 profiles for
LTC:

Active: 6-8-1-0, 15,
40%

USAR: 4-10-0-1, 15,

26%

ARNG: 1-5-0-0, 6,

After consolidation

SR has 1 profile for LTC:

11-23-1-1, 36, 30.5%

Reminder: profile numbers reflect as ACOM-COM-BCOM R-BCOM NR, Total, Percent ACOM

Profile Consolidation Examples (2)

- Combining profiles may result in a senior rater (SR) having an unauthorized Above Center of Mass (ACOM) profile % equal to or greater than 50%; a profile consolidation misfire.
- A senior rater in this situation may:
 - (1) Do nothing and use subsequent OERs to achieve an authorized percentage of ACOM for that rank which is less than 50%. Next reports submitted are COM.
 - (2) Contact ESO; request a restart of the profile. HQDA will waive requirements (i.e., senior rater permission, 3 processed reports, and a documented misfire) when the misfire is caused by profile consolidation.
- AR 623-3 policy: When SR completes his/her first 4 OER for a rank, the profile may

Prior to consolidation
SR has 3 profiles for
LTC:

Active: 1-2-0-0, 2, 50%
USAR: 1-1-0-0, 2, 50%
ARNG: 1-0-0-0, 1, 100%

After consolidation
SR has 1 profile for LTC:

3-2-0-0, 5, 60%

Reminder: profile numbers reflect as ACOM-COM-BCOM R-BCOM NR, Total, Percent ACOM

Profile Consolidation & DA Form 67-9

Consolidation of the senior rater profile impacts Part VII.b box check and the Part VII.a answer to "I currently senior rate (#) officers in this grade."

PART VII - SENIOR RATER	
a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE	
☒ BEST QUALIFIED ☐ FULLY QUALIFIED ☐ DO NOT PROMOTE ☐ OTHER (Explain below)	I currently senior rate <u>1</u> officer(s) in this grade A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review ☒ YES ☐ NO (Explain in c)
b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA) ☐ ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box) ☒ CENTER OF MASS ☐ BELOW CENTER OF MASS RETAIN ☐ BELOW CENTER OF MASS DO NOT RETAIN +	c. COMMENT ON PERFORMANCE/POTENTIAL CW3 Buck is the most outstanding warrant officer I have ever served with. He has earned the respect and trust of every commander in the brigade. Particularly noteworthy was his contribution to the warfighting ability of the battalion and brigade by keeping the M2 Bradley Fighting Vehicles operationally ready. His fellow technicians acknowledge him as the best technician in the division. He is a Soldier and leader first, and maintains those skills at a level that equals his technical acumen. CW3 Buck has the ability to meet any challenge. Promote below the zone to CW4. A future CW5. d. LIST THREE FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE. Division Maintenance Officer, TRADOC instructor, CASCOM Doctrine writer

DA FORM 67-9, MAR 2006

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APD PE v4.01ES

Develop a Senior Rater Rating

Plan

Name	Position	# of OERs previously received in current position (include previous SR's OERs)	Last OER/Type/Rating <u>Codes:</u> Change of Rater - CR Change of Duty - CD PCS - PCS Annual - AN Com the Record - CTR SR Option - SO Relief for Cause - RFC <u>Ratings</u> ACOM/COM/BCOM	Projected OER Date of next OER	Projected Type Type of report (Use Codes)	Projected Rating How I would rate this officer if I rated everyone today <50% in ACOM (Adjust as events dictate)	OER to DA(90days) Date report needs to be at DA (except board reports need to get to DA per board message)	Subsequent OER Will the officer receive more reports from you after the proj OER, if so how many	Cohort YG	Next Board/Date Next selection board the officer would be eligible for (Use chart profile management board dates)	Projected Departure/Promotion
Black, A	BN XO 1/35 Inf	1	Jun 04/CR/COM	Jun-05	AN	COM	Sep-05	Yes (1)	1991	BZ LTC- Mar-05	Nov-06
Smith, D	BN S3 1/35 Inf	1	Jun 04/CR/ACOM	Dec-05	PCS	ACOM	Mar-05	No	1991	BZ LTC-Jan-06	Dec-06
Jones, T	BN Cdr 1/35 Inf	0	Jun 04/CR/COM	Jun-05	AN	ACOM	Sep-05	Yes (1)	1992	BZ COL-Jul-05	Jun-06
Davis, R	BN XO 1/36 Inf	0	Jun 04/CR/COM	May-05	CD	COM	Aug-05	No	1992	BZ LTC-Jan-07	Jun-05
Pike, M	BN S3 1/36 Inf	0	Jun 04/CR/COM	Jun-05	AN	ACOM	Sep-05	Yes (1)	1991	BZ LTC-Jan-06	May-06
Bass, S	BN Cdr 1/36 Inf	2	July 04/CD/COM					No	1990	BZ Col-Jul-05	Aug-06
Doe, J	Bde S-1	1	Aug 04/PCS/ACOM					No	1992	BZ LTC-Jan-07	Aug-07
Buck, J	Bde CM Off	0	Sep04 /CR/COM	Sep-05	AN	COM	Dec-05	Yes (1)	1991	BZ Major-Oct-05	Jun-06
Fawn, B	Bde S-3	1	Sep 04/CR/ACOM	Apr-99	PCS	ACOM	Jul-05	No	1992	BZ LTC-Jan-07	Apr-06
Rockfish, A	BN Cdr Support	0	Jun 04/AN/COM	Jun-05	CD	COM	Sep-04	Yes (1)	1990	BZ Col-Jul-05	Jan-06
Example											

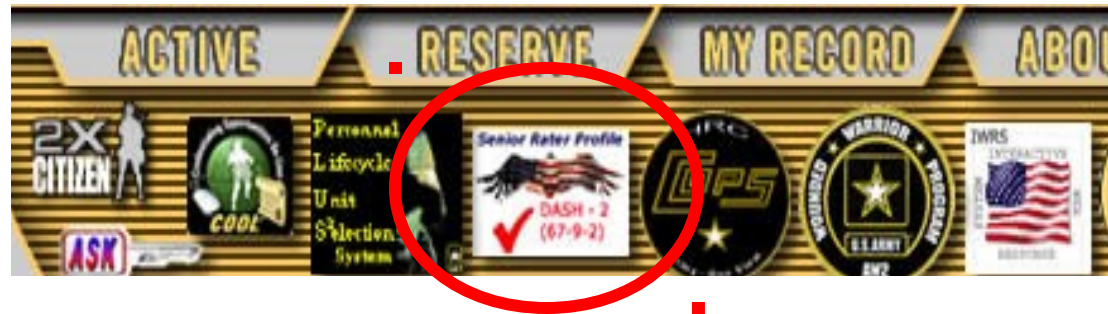
Note: Promotable Officers serving in positions authorized the promotable grade will be profiled at the promotable grade if listed as (P) in the grade block of the OER.

Points for Timely Submissions ...

1. Rating officials who document counseling and who are not burdened in completing administrative actions have an easy time completing and submitting evaluations in a timely manner.
 - Anyone can start a support form, drawing information from ITAPDB (obtaining needed admin information)
 - A single step in My Forms transfers all information from the support form to a final OER or NCOER
 - Forms can be routed around officials for signature and corrections
2. After **(date)** (consolidation of OER senior rater profiles) all reports will be due at HRC within 90 days after the THRU date on the report.
 - After (date) all OER will be submitted to HRC Alexandria either electronically by My Forms or in paper
 - Expected by August all NCOER will be submitted to HRC
3. HRC will officially track all OER received after 1 Jun 07 and NCOER after 1 Oct 07. ARNG NCOER will remain at State level for processing to Soldier OMPF. Evaluation Timeliness Reports are tied to senior raters.
4. Check MILPER messages for selection board requirements. “Received NLT” dates are not waiverable by anyone in the evaluations office.

Points for Eval Systems Managers ...

- The online SR profile for AC OER includes The Evaluation Timeliness Report. It tracks OER received 1 Jan 07 and will be reset to 1 Jun 07.



- This SR profile will include OER submission information on USAR & ARNG OER after SR Profile consolidation effective (date).
- Timeliness is calculated using date of receipt at HQDA and THRU date on report. A report is on time when received within 90 days after its THRU date.
- Submission requirements synchronized to 90 days for all reports with the OER SR Profile consolidation, effective (date).
- By summer, 2007 Active and USAR NCOER information will reflect in this report. ARNG NCOER information will remain at State level. Additional messages will detail the transition for NCOER.
- Once we start tracking NCOER information, any Senior Rater (officer or NCO) will be able to access the SR Profile on time to obtain their

Senior Rater Evaluation Timeliness Report

FOR USE OF THIS FORM SEE AR 623-3; PROPONENT AGENCY IS ACoFS, G-1

NAME: JONES, CARLOS W.	SSN: 888888888	RANK: BG	CREATED DATE: 20060201
----------------------------------	--------------------------	--------------------	----------------------------------

RO Rank	# Reports Submitted	# Reports On Time	% Reports On Time
MG	0	0	0
BG	0	0	0
COL	200	200	100%
LTC	400	200	50%
MAJ	50	47	94%
CPT	100	10	10%
1LT	100	90	90%
2LT	100	50	50%
CW5	0	0	0
CW4	0	0	0
CW3	0	0	0
CW2	0	0	0
WO1	0	0	0
Total for OER	950	597	62%
SGM	Tbd	Tbd	Tbd
MSG	Tbd	Tbd	Tbd
SFC	Tbd	Tbd	Tbd
SSG	Tbd	Tbd	Tbd
SGT	Tbd	Tbd	Tbd
Total for NCOER	TBD	TBD	TBD
DA Form 67-9-2A, 15 May 2006 Total for Evals	950	597	62%

CREATE EXCEL SPREADSHEET

Notes:

- 1. On-time calculations for OER & NCOER are based on reports being received at HQDA within 90 days after THRU date, regardless of component.**
- 2. When available, NCOER information covers Active and USAR reports. ARNG NCOER are kept at State level.**
- 3. Senior rater can view details on the late reports by selecting a specific rank.**

FOR OFFICIAL USE ONLY

Senior Rater Evaluation Timeliness Report

FOR USE OF THIS FORM SEE AR 623-3; PROPONENT AGENCY IS ACoFS, G-1

NAME: JONES, CARLOS W.	SSN: 888888888	RANK: BG	CREATED DATE: 20060201
----------------------------------	--------------------------	--------------------	----------------------------------

Late Reports For This Senior Rater and This Rank

RO Rank	# Reports Submitted	# Reports On Time	Reports Late	% Reports On Time
MAJ	50	47	3	94%

Rank	RO Name	Report Thru Date	Date at HQDA	1-30 days late	31-60 days late	61-90 days late	over 90 days	Current Status
MAJ	Ortiz, Renee	20050101	20050501		X			completed
MAJ	Byers, Sam	20041003	20051003				X	complete
MAJ	Green, Tobias	20030101	20050202				X	completed
Total for this SR	-	-	-	0	1	0	2	

Details for late reports shown as part of the Senior Rater Evaluation Timeliness Report

Specifics for the late Major's reports.

Processing a Military Evaluation:

- Subsequent slides lay out a method of using My Forms with OER and NCOER processing. The first two, after this next slide, are best printed and viewed – they are very difficult to read on screen.
- There are other ways to execute this processing but this is a good start for most units.
- Using My Forms for all actions reduces the possibility of errors and provides the greatest amount of tracking and administrative coverage for HR managers.
- The technology described here includes a set of tools – it is not designed to replace the very necessary and important human interaction required (and desired) between rating officials and rated Soldiers. Tools guide right behavior but are flexible to meet a variety of needs at local levels
- It all starts with the support form and counseling.

Army Knowledge Online - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <https://www.us.army.mil/suite/authenticate.do>

U.S. ARMY **AKO** ARMY KNOWLEDGE ONLINE

Welcome, Jan Swicord (CAC Session)
[My Account](#) | [Contribute Content](#) | [Help](#) | [Logout](#)

Email Files Forums Groups IM/Chat **My Forms** White Pages

Home My Workspace Site Map My Favorites Quick Links Self Service

Tuesday, 3 October 2006

AKO News

Army Wide Announcements

AKO Search

On 30 September, designed to give you

Search Upgrade Overview

Safety News

The New Search is Here!
Tell us what you think of the new search
CAC Questions? Submit your question
Resource Center
My Account
Registration
Site Locator

MY SOLDIER DATA

View the status of your dependents: [My DEERS](#)
View your Leader Development Portfolio: [LDP Page](#)

ARMY LINKS

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[MyPay](#)
[National Security Personnel System \(NSPS\)](#)

ARMY NEWS

- MND-B transfers control of FOB Duke to ISF
- Iraqis take control of northern Diyala
- Army ready to support families of extended Soldiers
- More

**“My Forms”
Link
on AKO Home**

Use My Forms behind AKO to get support forms and route support forms and final evaluations between rating officials.

Done

Start

Microsoft Office Word 2003 Microsoft Office Excel 2003 Microsoft Office PowerPoint 2003 Army Knowledge Online

Internet

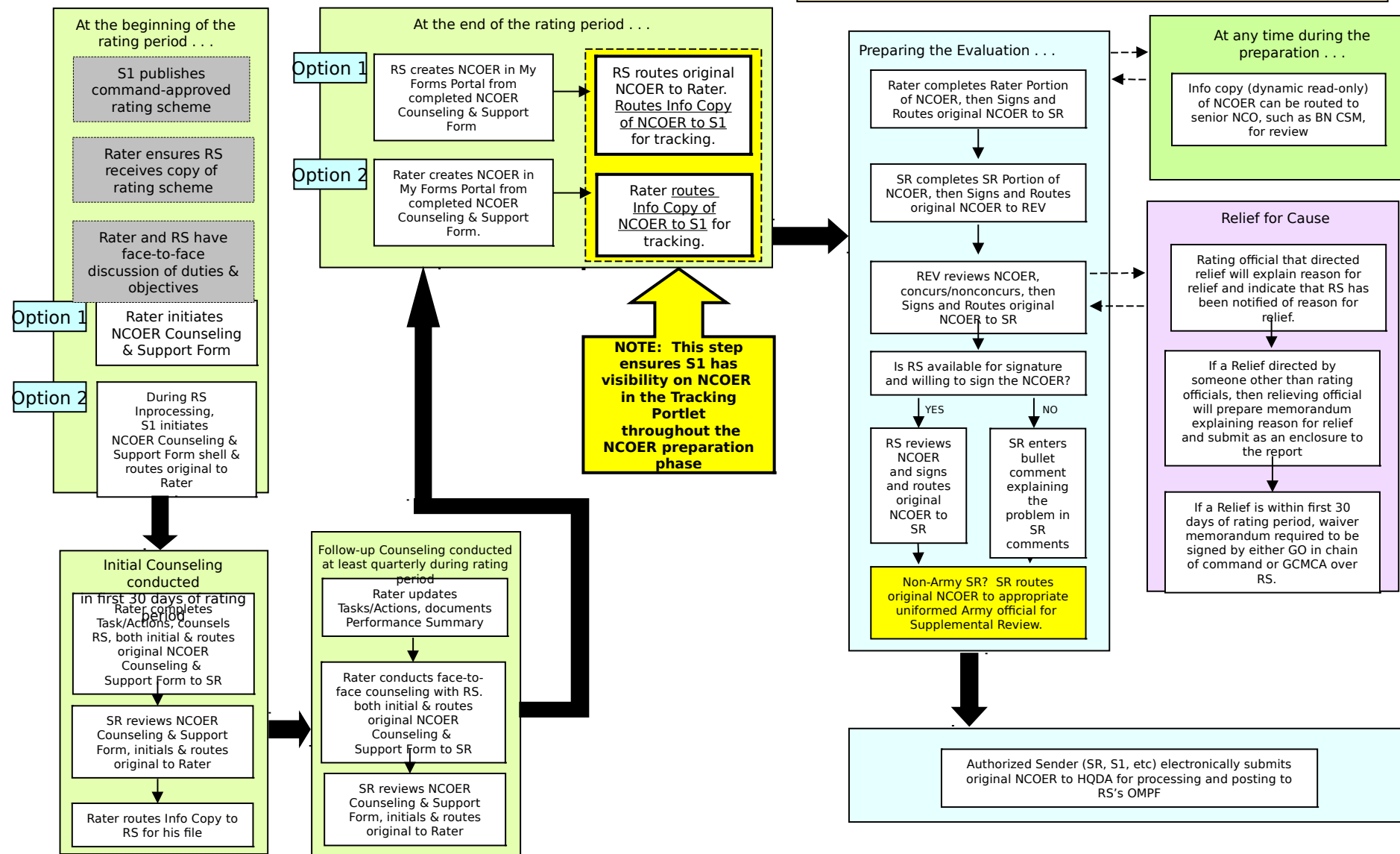
9:50 AM

AKO My Forms Portal Evaluations Business Process - NCOs

LEGEND

RS Rated Soldier
SR Senior Rater
REV Reviewer

□ Action in My Forms Portal
■ Action offline



S1 tracks NCOER status using Tracking Portlet in AKO My Forms Portal.

This is an evaluation wizard form ...

Page 1 of 6

NO DATA. Please click the Begin OER button below to create an evaluation.

**OFFICER EVALUATION REPORT**
DA FORM 67-9[Link to AR 623-3](#)

Administrative Data | Rater Actions | Inter Rater Actions | Senior Rater Actions | Rated Soldier | Enclosures

Data Entry - Rated Soldier
Admin Data - Rated Soldier
Admin Data - Continued
Data Entry - Rating Chain
Auth - Rating Chain
Duty Des - Rated Soldier

Select Method for Data Entry – Rated Soldier

You may automatically populate this OER form by retrieving the Rated Soldier's personnel information from the Army personnel database. If you choose not to prepopulate this form, you will be required to manually enter all required information.

- In OER and NCOER (support forms and evaluations) if you don't see green screens, you aren't in the wizard. The wizard guides you through the process and allows you to enter content to the form using a series of questions and pull down menu and keeps you from making most errors.
- There are tabs across the top (and associated tabs to the right) that allow you to move around the form sections easily.
- **Avoid** selecting View Form (lower left) until the report is completed

View Form **Previous**

Page 1 of 6

Don't hit "VIEW FORM" and start typing ...

DA Form 67-9 - PAGE 1 of 2

U.S. ARMY
Forms Content Management

SAVE SAVE AS PRINT EMAIL WIZARD NEXT >>

OFFICER EVALUATION REPORT
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.

FOR OFFICIAL USE ONLY (FOUO)
SEE PRIVACY ACT STATEMENT IN AR 623-3.

PART I - ADMINISTRATIVE DATA

a. NAME (Last, First, Middle Initial) b. SSN c. RANK d. DATE OF RANK (YYYYMMDD) e. BRANCH
f. SPECIALTIES / PMOS (w/o)

g.1. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND g.2. STATUS CODE h. REASON FOR SUBMISSION

i. PERIOD COVERED j. RATED MONTHS k. NONRATED CODES l. NO. OF ENCL m. RATED OFFICER'S APO EMAIL ADDRESS (gov or mil) n. UIC o. CMD CODE p. PSB CODE

PART II - AUTHENTICATION (Rated officer's signature verifies officer has seen completed OER Parts I-VII and the admin data is correct)

a. NAME OF RATER (Last, First, MI) SSN RANK POSITION SIGNATURE DATE (YYYYMMDD)

b. NAME OF INTERMEDIATE RATER (Last, First, MI) SSN RANK POSITION SIGNATURE DATE (YYYYMMDD)

c. NAME OF SENIOR RATER (Last, First, MI) SSN RANK POSITION SIGNATURE DATE (YYYYMMDD)

SENIOR RATER'S ORGANIZATION BRANCH SENIOR RATER TELEPHONE NUMBER E-MAIL ADDRESS (gov or mil)

d. This is a referred report, do you wish to make comments? e. SIGNATURE OF RATED OFFICER DATE (YYYYMMDD)

Yes, comments are attached No

a. PRINCIPAL DUTY TITLE

c. SIGNIFICANT DUTIES

a. ARMY VALUES

When you enter evaluation content using this form view:

- If you know what you are doing, you can get most of it correct.
- If you don't, you don't receive any help aids which are embedded in the wizard.
- Go to this view once you are ready to final review and digitally sign or save the document back to My Forms (the repository).
- Several odd things happen with the computer coding and help buttons when you type in content using this view format. Use the wizard.

Start OERS-E 3.3 H:\Shared\TAG... My Documents draft Tng 2007 ... DA Form 6

Autofill Information to a Form:

U.S. ARMY

Administrative Data Rater Actions

Data Entry - Rated Soldier

Select Method for Data Entry – Rated Soldier

You may automatically populate this NCOER Counseling and Support form by retrieving the Rated Soldier's personnel information from the Army personnel database. If you choose not to prepopulate this form, you will be required to manually enter all required information.

☐ Manually enter Rated Soldier's administrative data.

☒ Automatically populate the Rated Soldier's administrative data by searching the Army personnel database. If any of the administrative information is incorrect as pulled from the personnel database of record, you can manually change the information within the form. You must use other channels (S1 or Admin Support) to have the incorrect information changed.

Enter requested data and click SEARCH. (All fields highlighted in yellow are required.)

Rated Soldier's SSN	Rated Soldier's Last Name (First Two Letters)	SEARCH
111-11-1111	CRA	

Once inside a wizard form, select the automatically populate box. Add a SSN and at least the first 2 letters of the last name. Hit S. No demo for these slides as it doesn't work for a fake SSN. This information from ITAPDB. If the pull doesn't work – check the SSN and retry. If it still doesn't work, manually enter information.

Autofill Information to a Form:



NCOER COUNSELING AND SUPPORT FORM DA FORM 2166-8-1

[Link to AR 623-3](#)

U.S. ARMY

Administrative Data

Rater Actions

Administration Data - Rated Soldier

a. Name *(Last, First, Middle Initial)*

CRAWFORD, ARLITA R.

b. SSN

111-11-1111

c. Rank

SGM

d. Date of Rank

20050701

e. PMOSC

42A50

[CLICK HERE](#)

f.1. Unit

Organization

Station

Zip

Major Command

USA HRC, MSD, TAG, 200 Stovall Street, Alexandria VA 22332-0442

f.2. Status Code

l. Rated NCO'S AKO Email Address

arlita.crawford@us.army.mil

m. UIC

W6ED24

n. CMD
Code

SB

o. PSB
Code

MD12

Recommend you use a .gov or .mil

Enter the first date of the rating period: [CLICK HERE](#)
(YYYYMMDD)

20061004

Info pulled from ITAPDB can be updated if it is not correct.
Usually, unit information needs to be cleaned up to make it le

Complete NCOER Counseling:

NCOER COUNSELING AND SUPPORT FORM
DA FORM 2166-8-1

Administrative Data | Rater Actions

Competence – Task/Actions

Enter Tasks or Actions relevant to Competence. Use this part of the form to enter expectations of the Rated Soldier during the rating period. Provide clear objectives and results. If you need additional space, click ADD PAGE to add a continuation page. For more information on continuation pages, click HERE.

What rater expects rated Soldier to do in...
can be updated throughout the rating period...

Bullet Formatting Guidance

ADD PAGE

View Form

Previous Next

Page 3 of 13

At the beginning of an evaluation period the rater (for an NCO) enters what he/she expects the rated Soldier to accomplish during the evaluation period.

When viewing a printed page these are the “left column” blocks.

Raters can add a page if needed.

Task/Action tabs alternate with performance tabs along left edge.

Complete NCOER Counseling:

U.S. ARMY

Administrative Data Rater Actions

Competence – Performance Summary

Enter the Rated Soldier's accomplishments relevant to Competence. If you need additional space, click ADD PAGE to add a continuation page within the wizard. For more information on continuation pages [CLICK HERE](#)

- o Duty proficiency; MOS competency
- o Technical & tactical; knowledge, skills, and abilities
- o Sound judgment
- o Seeking self-improvement; always learning
- o Accomplishing tasks to the fullest capacity; committed to excellence

Document what the rated Soldier did throughout the rating period.

Can be updated continuously.

Rater reviews prior to transfer to evaluation and places most important items in the "visible" section. |

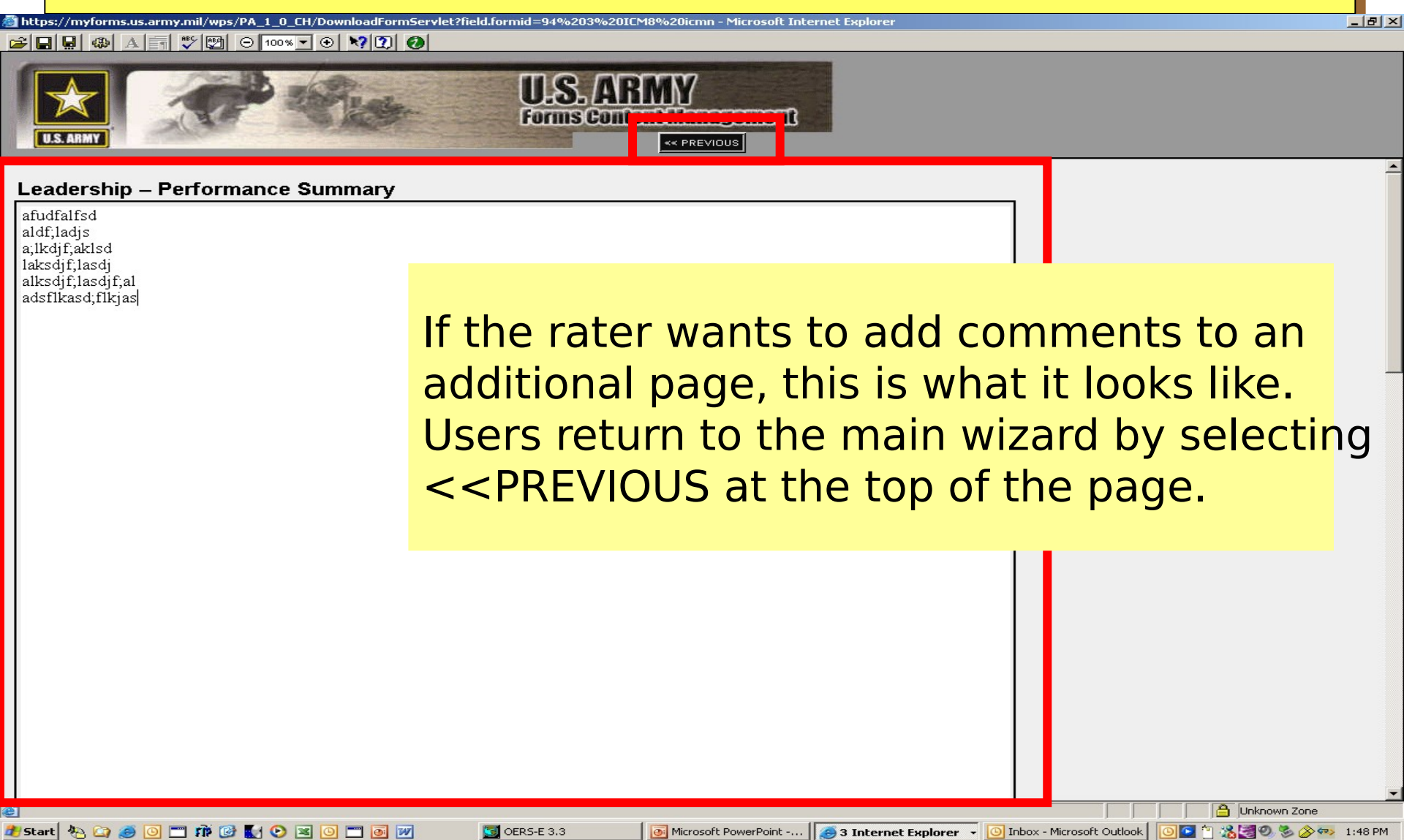
[Bullet Formatting Guidance](#) [ADD PAGE](#)

Army Values - Task/Actions
 Army Values - Performance
 Competence - Task/Actions
 Competence - Performance
 Physical Fit - Task/Actions
 Physical Fit - Performance
 Leadership - Task/Actions
 Leadership - Performance
 Training - Task/Actions
 Training - Performance
 Responsibility - Task/Actions
 Responsibility - Performance
 Counseling Complete

At least quarterly throughout & at the end of an evaluation period (for an NCO) enters what the rated Soldier accomplished during the evaluation period. Raters can add a page if needed.

Performance sections alternate with Tasks/Action tabs on left.

Additional Pages for NCOER Spt Form:



If the rater wants to add comments to an additional page, this is what it looks like. Users return to the main wizard by selecting <<PREVIOUS at the top of the page.

Additional Pages for NCOER Spt Form:

U.S. ARMY

Administrative Data | Rater Actions

Leadership – Performance Summary

Enter the Rated Soldier's accomplishments relevant to Leadership. If you need additional space, click ADD PAGE to add a continuation page within the wizard. For more information on continuation pages [CLICK HERE](#)

o Mission first
o Genuine concern for Soldiers
o Instilling the spirit to achieve and win
o Setting the example; Be, Know, Do

What I have done:
asdkfads
akdjfhaksj'
akdjfhaksdj
akdsjfhlkaj
adksjfhalsd'ajkfhadskj fha
aksdjfhdsf

[Bullet Formatting Guidance](#)

EDIT PAGE

After adding comments to an additional page and returning to the Wizard form, the user no longer sees an option to add a page. The function box now reflects an option to EDIT PAGE. Should you see EDIT PAGE, you know there is an additional page of information.

Complete NCOER Counseling:

NCOER COUNSELING AND SUPPORT FORM				FOR OFFICIAL USE ONLY (FOUO) SEE PRIVACY ACT STATEMENT IN AR 623-3.	
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.					
PART I - ADMINISTRATIVE DATA					
a. NAME (Last, First, Middle Initial) CRAWFORD, ARLITA R.	b. SSN 111-11-1111	c. RANK SGM	d. DATE OF RANK 20050701	e. PMOSC 42A50	
f. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND USA HRC, MSD, TAG, 200 Stovall Street, Alexandria VA 22332-0442	STATUS CODE	i. RATED NCO'S EMAIL ADDRESS (gov. or .mil) arlita.crawford@us.army.mil		m. UIC W6ED24	n. CMD CODE SB
o. PSB CODE MD12					
PART II - AUTHENTICATION					
a. NAME OF RATER (Last, First, Middle Initial) SWICORD, JAN T.	SSN 222-22-2222	INITIAL 20061016	LATER 20070118	LATER /----	LATER /----
RANK, PMOSC/BRANCH, ORGANIZATION, DUTY ASSIGNMENT GS-14, ESO, MSD, TAGD, USA HRC Alex VA, Chief, Eval Systems Office			RATER'S AKO EMAIL ADDRESS (gov. or .mil) jan.swicord@us.army.mil		
b. NAME OF SENIOR RATER (Last, First, Middle Initial) PICCIRILLI, GEORGE J.	SSN 333-33-3333	INITIAL 20070119	LATER 20070119	LATER /----	LATER /----
RANK, PMOSC/BRANCH, ORGANIZATION, DUTY ASSIGNMENT GS-15, MSD, TAGD, USA HRC, Alex VA, Chief, Management Support Division			SENIOR RATER'S AKO EMAIL ADDRESS (gov. or .mil) george-piccirilli@us.army.mil		
c. NAME OF REVIEWER (Last, First, Middle Initial) JONES, REUBEN	SSN 444-44-4444	INITIAL /----	LATER /----	LATER /----	LATER /----
RANK, PMOSC/BRANCH, ORGANIZATION, DUTY ASSIGNMENT COL(P), TAG, USA HRC Alexandria VA, The Adjutant General			REVIEWER'S AKO EMAIL ADDRESS (gov. or .mil) reuben.jones@us.army.mil		
d. RATED NCO's INITIAL's	INITIAL 20061019	LATER 20070119	LATER /----	LATER /----	LATER /----

Admin Note:
these dates are
for demo
purposes only.

With counseling completed rating officials and rated Soldier can CAC sign/initial the form. You don't have to counsel sitting next to a computer. Discuss performance and potential in a reasonable setting and individuals physically sign the form at the first opportunity thereafter. If there are problems getting to a computer, the rater can make notes internal to the form. Discussions about expectations and performance are important.

Additional Pages For OER Spt Form:

The screenshot shows the 'U.S. ARMY' OER Spt Form interface. The top navigation bar includes 'Administrative Data', 'Rated Soldier Actions', and 'Review'. The left sidebar contains a vertical menu with the following items: 'Performance Objectives', 'Army Phys. Fitness Data', 'Significant Contrib.', 'Unique Skill/ Areas Exper.', 'Branch/ Career Pref.', and '3 Future Assignments'. The main content area is titled 'Significant Contributions – Rated Soldier' and contains the instruction 'List your significant contributions.' Below this is a large text input field. A red arrow points from the 'Significant Contrib.' menu item to the text field. A black arrow points from the bottom of the text field to an 'Alert' dialog box. The dialog box has a blue title bar and contains the text: 'Only 12 lines of text can be entered in this field. You may use the attachments feature in VIEW FORM for continuation sheets.' and an 'OK' button.

OER support forms limit text but allows for attachments to document rated officer's accomplishments. Only text visible on the support form itself will transfer to the evaluation automatically. As the support form should accompany the final evaluation during it's preparation the rating officials should review the support form in its entirety (to include the attached pages) to glean relevant information for the final assessment.

FYI: We deliberately limited the space on the support form to that which is available on a final evaluation so this transfer action would not randomly truncate information

Additional Pages For OER Spt Form:

OFFICER EVALUATION REPORT SUPPORT FORM For use of this form, see AR 623-3; the proponent agency is DCS, G-1.					FOR OFFICIAL USE ONLY SEE PAGE 2	
PART I - RATED OFFICER IDENTIFICATION						
NAME OF RATED OFFICER (Last, First, MI)	SSN	RANK	DATE OF RANK (YYYYMMDD)	BRANCH	DESIGNATED/PMOS (MOS) SPECIALITIES	
UNIT, ORG., STATION ZIP CODE OR APO, MAJOR COMMAND	STATUS CODE	FROM DATE	UIC	CMD CODE	PSB CODE	
PART II - AUTHENTICATION						
NAME OF RATER (Last, First, MI)	SSN	RANK	POSITION			
NAME OF INTER. RATER (Last, First, MI)	SSN	RANK	POSITION			
NAME OF SENIOR RATER (Last, First, MI)	SSN	RANK	POSITION			
PART III - VERIFICATION OF FACE-TO-FACE DISCUSSION						
MANDATORY RATER / RATED OFFICER INITIAL FACE-TO-FACE COUNSELING ON DUTIES, RESPONSIBILITIES AND PERFORMANCE OBJECTIVES FOR THE CURRENT RATING PERIOD TOOK PLACE ON (Date)		Rated Soldier Initials	Rater Initials	Senior Rater Initials (Review)		
PERIODIC RATER / RATED OFFICER FOLLOW-UP FACE-TO-FACE COUNSELINGS:						
Dates		Rated Soldier Initials	Rater Initials	Senior Rater Initials (Review)		

Attach Enclosure
 Display Enclosure
 Extract Enclosure
 Remove Enclosure

Additional pages are added to an OER support using an attachment. Select Attach Enclosure and browse to a document that is already created.

As of 19 Mar 07 -when you sign a support form it locks down the attachment from being viewed by anyone else (to include the person who attached it). This is an error in the form we are working to get fixed. Check that you can display the enclosure after signature. Temp work around is to not sign the report with an attachment but make a note of why you didn't sign in the accomplishments section of the form.

Create Evaluation From Support Forms:

U.S. ARMY

FCMP | HQDA

Welcome | Inbox | **Drafts** | Favorites | Recycle Bin

Form Finder

Form Number: Form Title: Search

Drafts

Forms | Folders | Drafts -- 6 Form(s), 1 Folder(s)

	Form Name	Form Type	Create Date
Create Folder	☐ AAM MAJ J.S. Smith THRU 20061212	DA 638	Feb 06, 2007 14:00:25 GMT
Upload Form	☐ NCO EVALUATION REPORT	DA 2166-8	Mar 15, 2007 16:15:29 GMT
Add To Folder	☐ OER MAJ Smith X.L THRU 20070101	DA 67-9-1	Mar 13, 2007 03:11:10 GMT
Extract	☐ PERSONNEL ACTION	DA 4187	Mar 15, 2007 16:14:08 GMT
Comment	☐ SGM J.S. Smith St art 1 Mar 06	DA 2166-8-1	Jan 26, 2007 21:58:37 GMT
Rename	☒		
Copy	☐ SSG JS Smith THRU 20070101	DA 2166-8	Mar 01, 2007 14:54:23 GMT
Delete	☐		
Route Slip			

Sp. Tasks
Sp. Tasks
Create NCOER

Tracking

Once you place a check in the functions box the Sp. Tasks (Special Tasks) function button will activate.

Select the arrow button to show the special tasks available for this particular form.

Highlight and select the task Create OER (or) Create NCOER. The option depends on the form type you have selected.

If this option does not become available check that you have the right form selected (it only works for OER or NCOER support forms) and check that you only have 1 form selected (it will not open if multiple forms are selected).

Adding Content to Evaluations:

NS DMM: Please click the Begin SER button below to create an evaluation.

The screenshot shows the U.S. Army Evaluation System interface. The top navigation bar includes 'OFFICER' and 'U.S. ARMY'. The left sidebar contains a vertical menu with options: 'Promotion Potential', 'Potential Comparison', 'Perform and Potential', 'Senior Rater Review Responsib.', and 'Senior Rater Signature'. The main content area is titled 'Performance and Potential Comments' and includes a sub-header 'Comment on rated soldier's performance and poten'. A large text box is labeled 'Paste here ...'. Below this, there is a section for 'List 3 future assignments for Bde S6, Bn XO/S3, Joint St'. A red arrow points from a 'Copy' button (partially visible) to the 'Paste here ...' text box. A red box highlights a warning message: 'Suggested co always make you are copy word let you execute if what you want to copy is larger than the space you are trying to copy it in.'

There are many ways to add text (content) to an evaluation:

- (1) Transfer information automatically from the counseling/ support form. Revise information and go to (2).
- (2) Answer the questions within the form wizard. Once complete select FORM VIEW for review.
- (3) Cut and paste information from other forms or documents, if necessary.
 - Open document with text you want to copy.
 - Highlight text & right click mouse, select copy
 - Go to form, right click mouse, select paste

Route Evals Between Rating Officials:

U.S. ARMY
Forms Content Management

FCMP

Welcome | Inbox | Drafts | Favorites | Recycle Bin | Admin | Help

Form Finder

Form Number: Form Title:

Drafts

ROUTE...

SGM Crawford Spt Form Aug 06

Search Users Last Name: First Name:

Original

Please select a user

No Date ☐

Please enter comments here.

Last Name	First Name	Rank

When Route function is selected, this page appears. Steps include:

1. Select a recipient of the document (names will appear on right side)
2. Choose the type of document transmission
3. Decide if a notification email is needed
4. Decide if a suspense date/time is needed
5. Click on Route button

This page is being revised by APD and once complete will be user

Route Eval Between Rating Officials:

Use My Forms routing whenever possible because it:

1. Provides tracking & accountability capability
2. Is fast and reliable
3. Results in the least amount of problems with eval forms

Take a form out of My Forms and email it? You can - when a rating official does not have an AKO logon or access to AKO but has a CAC reader for signature, BUT - doing so results in the greatest amount of our technical problems while uploading & submitting.

General Routing Notes:

1. AR 623-3 and DA PAM 623-3 detail an order for completion.
2. Rated officer and rated NCO should see completed report.
3. Individuals not physically in rating chain, but who need to view or comment (i.e., CSM, S1), can be sent

Information Copies:

This example shows:

- (1) The original going to the rater (with reminder email & text) and
- (2) an information copy being sent to the S1 (for tracking)

Sender had to search on a second name to come up with a recipient for this info copy.

In this instance both recipients get an email to their AKO addresses notifying them that a form has been routed to their

The screenshot shows the U.S. Army Forms Center interface. At the top, there's a navigation bar with 'FCMP' and 'HQDA'. Below it, a 'Form Finder' section has input fields for 'Form Number' and 'Form Title', and buttons for 'Search' and 'Search By Range'. The main section is titled 'Drafts' and shows a draft form titled 'ROUTE...'. Below this, there's a 'Search Users' section with 'Last Name: speegle' and 'First Name: james'. The 'Original' section (1) shows a form being routed to 'Swicord' with a date of '1/1/2007' and a time of '1 hr'. The 'Info Copy' section (2) shows a form being routed to 'James Speegle' with an email address. The 'Email Copy' section has a text area for entering text for the email. The 'Tracking' section at the bottom shows 'Forms' and 'Folders' tabs, and a status bar indicating 'Tracking -- 7 Form(s). 3 Folder(s)'.

Email Copies vs. Email Routing:

ROUTE...

SSG JS Smith THRU 20070101

Search Users Last Name: First Name:

Original

Please select a user

No Date 2007 email

Please enter comments here.

Info Copy

email

Email Copy

☐ Karen Scherer

Karen -- for your review. I know you can't sign on AKO right now but look at the changes we made and let me know if they are OK. You can sign when you get the first opportunity.

U.S. ARMY Forms Content Management

SAVE SAVE AS PRINT **EMAIL** WIZARD NEXT >>

NCOER COUNSELING AND SUPPORT FORM
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.

PART I - ADMINISTRATIVE DATA

a. NAME (Last, First, Middle Initial) CRAWFORD, ARLITA R.	b. SSN 111-11-1111	c. RANK SGM	d. DATE 2007
f. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND TUSA HRC MSD TAG 200 Stovall Street	STATUS CODE	I. RATED NCO'S EMAIL ADDRESS (gov or mil) arlita.crawford@us.army.mil	
m. UIC			

The email button in the VIEW FORM mode allows a user to send an original form (one which can be altered) to non-AKO users for content input & electronic signature. This takes the form out of My Forms. User ends in Outlook with this form as an email attachment. At that point user selects recipient for the email.

Email option under the ROUTE function (*static* routing) sends a copy of the form -- a snap shot in time -- a read only copy. The recipient cannot alter content. This takes a copy out of My Forms but leaves the original in the system. Copy, with email text, is sent to designated recipient's AKO email address.

Upload a Form into My Forms:

Upload any PureEdge form from a local drive to the My Forms Portal

You need to use this only if the form original has been taken out of the system for any reason.

Two ways to get out of My Forms:

- Save As
- Email from inside Form

My Forms on Army Knowledge Online - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address

U.S. ARMY Forms Content Manager

FCMP HQDA

Welcome Inbox **Drafts** Favorites Recycle Bin Help ATS Reports Set

Form Finder

Form Number: Form Title: Search Search By Range Non-PureEdge

Drafts

Forms Folders Drafts -- 4 Form(s), 2 Folder(s) 1

Form Name	Form Type	Create Date	Last Action	Suspense Date
638 MAJ Lewis PCS	DA 638	Feb 06, 2007 14:00:25 GMT	-	-
NCOER Counseling Test	DA 2166-8-1	Jan 26, 2007 21:58:37 GMT	-	-
RECOMMENDATION FOR AWARD	DA 638	Feb 06, 2007 14:00:25 GMT	-	-
Test OER with Attachment	DA 67-9	Jan 26, 2007 21:54:37 GMT	-	-

Upload Form

Extract

Comment

Rename

Copy

Delete

Route Slip

Sp. Tasks

Tracking

Start

Calendar - Microsoft ...

OERS-E 3.3

Microsoft PowerPoint...

2 Internet Explor...

Internet

9:40 AM

Upload a Form into My Forms:

Upon successful upload, the computer will return you to the DRAFT tab

where you will see your uploaded form.

NOTE: The form name changes if it was renamed at the outset. Army Publishing Directorate is working to have uploaded forms retain the original name at upload. Until then...

You can rename the form back to what it was.

My Forms on Army Knowledge Online - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address

U.S. ARMY
Forms Content Management System

FCMP HQDA

Welcome Inbox Drafts Favorites Recycle Bin Help ATS Reports

Form Finder

Form Number: Form Title: Search Search By Range Non-P

Drafts

Forms Folders Drafts -- 6 Form(s), 2 Folder(s)

	Form Name	Form Type	Create Date	Last Action	Status
Create Folder	638 MAJ Lewis PCS	DA 638	Feb 06, 2007 14:00:25 GMT	-	-
Upload Form	jan.swicord_Upload	DA 2166-8	Mar 01, 2007 14:54:23 GMT	-	-
Add To Folder	Test	DA 2166-8-1	Feb 06, 2007 21:58:37 GMT	-	-
Extract	OFFICER EVALUATION REPORT	DA 67-9	Jan 12, 2007 14:28:45 GMT	-	-
Comment	RECOMMENDATION FOR AWARD	DA 638	Feb 06, 2007 14:00:25 GMT	-	-
Rename	Test OER with Attachment	DA 67-9	Jan 26, 2007 21:54:37 GMT	-	-
Copy					
Delete					
Route Slip					
Sp. Tasks					

Tracking

Done

Start

Calendar - Microsoft ... OERS-E 3.3

Submit Eval to HRC (HQDA):

U.S. ARMY
Forms Content Management

FCMP | HQDA

Welcome | Inbox | **Drafts** | Favorites | Recycle Bin | Help | ATS Reports | Settings

Form Finder

Form Number: Form Title:

Drafts

Forms | Folders | Drafts -- 6 Form(s), 2 Folder(s) 1 Close All

	Form Name	Form Type	Create Date	Last Action	Suspense Date
Create Folder	☐	638 MAJ Lewis PCS	DA 638	Feb 06 2007 14:00	
Upload Form	☐	AAM MAJ J.S. Smith THRU 20061212	DA 638	Feb 06 2007 14:00	
Add To Folder	☐	NCOER Counseling Test	DA 2166-8-1	Jan 2 2007 21:56	
Extract	☐	NCOER SGM Crawford THRU 20070101	DA 2166-8	Mar 0 2007 14:54	
Comment	☐	OER MAJ J.S. Smith THRU 20061215	DA 67-9	Jan 1 2007 14:28	
Rename	☐	Test OER with Attachment	DA 67-9	Jan 2 2007 21:54	
Copy	☒				
Delete	☐				

Sp. Tasks
Sp. Tasks
Send To HQDA

Once you place a check in the functions box the Sp. Tasks (Special Tasks) function button will activate.

Select the arrow button to show the special tasks available for this particular form.

Highlight and select the task SEND TO HQDA

Check for Receipt at HRC:

#1: Check My Forms tracking section for form status

- At HQDA APP: waiting to be opened & reviewed
- Date of view: opened & being reviewed. At this point report is either accepted and sent to HRC processing or returned to sender for correction.
- (if sender) watch My Forms inbox for returned reports
- (if sender) watch AKO email address for email stating corrections for a returned report (email will forward to designated address)

Tracking

Forms

Folders

Form Name

Recall

History

Comment

Delete

☐ Freem
e
☐ karen
2-4 A
☐ Swico
k 2 A
☐ Poole
g
☐ karen
1 Sep
☐ Leave
- 1 Se
☐ OER

☐ JoAnn Leave 1 Sep

OPM 71

ivey.kee

Sep 06, 2006
20:52:21 GMT

Not yet
viewed

☒ SGM Crawford Spt
Form Aug 06

DA 2166-8-1

HQDA APP

Sep 07, 2006
15:34:23 GMT

Not yet
viewed.

#2: Validate receipt and processing at HQDA (use online tools)



Use of Comments Function:

- Comments can be used to help keep a report processing.

- A CSM or S1 can enter a note that they have completed their review and the report is ready to be sent to HRC.

- Anyone can enter the date due to HRC.

- Anyone who has the form in his/her tracking has access to these comments.

- Don't use for comments of a very personal nature – everyone reads them!

- Comments here do not get included with an eval in an OMPF.

My Forms on Army Knowledge Online - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address

U.S. ARMY
Forms Center

FCMP | HQDA

Welcome | Inbox | **Drafts** | Favorites | Recycle Bin | Help | ATS Rep

Form Finder

Form Number: Form Title:

Drafts

COMMENT...

OER MAJ Smith X.L THRU 20070101

Enter Comments (These are public comments that follow the form)

User	Comments	Action Date
jan.swicord	CPT S: Bde Cdr wants to personally send in once signed.	Mar 19, 2007 18:26:30 GMT
jan.swicord	CPT S: S1 Reviewed. Good to go to HRC once rated officer signs.	Mar 19, 2007 18:25:59 GMT
jan.swicord	Due to HRC: Before 1 Mar 07 (well before 90 days)	Mar 19, 2007 18:24:53 GMT

Tracking

Forms | Folders | Tracking -- 7 Form(s). 3 Folder(s)

Done

Start

OERS-E 3.3

Microsoft Power

Use of Folders:

The screenshot shows the U.S. Army Forms Center interface. The top navigation bar includes links for FCMP, HQDA, Welcome, Inbox, Drafts, Favorites, Recycle Bin, Help, and ATS R. Below this is the Form Finder section with input fields for Form Number and Form Title, and buttons for Search and Search By Range. The main content area is titled 'Drafts' and shows a table of folders. The table has columns for Form Name, Form Type, Create Date, and Last Action. There are two folders listed: 'LTC Ortiz Jul 06 due Oct 06' (Folder[1]) and 'NCOER SGM Smith T HRU 1 Mar 06' (Folder[0]). To the left of the table are buttons for Create Folder, Upload Form, Add To Folder, Extract, Comment, Rename, Copy, Delete, Route Slip, and Sp. Tasks. The bottom of the interface shows a Tracking section and a Windows taskbar with various icons.

Form Name	Form Type	Create Date	Last Action
LTC Ortiz Jul 06 due Oct 06	Folder[1]	-	-
NCOER SGM Smith T HRU 1 Mar 06	Folder[0]	-	-

- Originally designed to allow users to pass multiple documents (i.e., a support form and OER) in one action rather vice many. (think all the DA 638 after an exercise or evals before a change of command...)
- (18 Apr 07) Folders are not working as intended. Once you put documents in a folder and route them to another person the documents cannot be extracted. You can copy them and delete the folder and start using the copies. We've asked for a fix on this.
- We don't recommend using folders until the fix is in place.

HRC Actions at Receipt

When a report is electronically submitted to HRC a processor opens the form and completes an initial review. If any errors are found the report is returned to the sender for correction. An email is sent to the senders AKO address explaining what is wrong with the report.

- Our goal is a 24-48 hours turn around (not counting weekends)
- Reports have been coming back to us (corrected) within the same time frame - some take longer.
- This process allows us to get the report through the HQDA processing and into a rated Soldier's OMPF much faster.
- If no errors are found the report is accept and sent on for

FYI:

- Many reports arriving in paper copy today to HRC have errors on them.
- Errors delay processing as we either stop to (1) reject or (2) make a correction.
- We try to not make a correction without contacting senior raters first.
- Our AKO process lets you make the correction (the right people to do so) and learn for future reports.

-Reports that arrive without error should not take as long to get to a Soldier's

OMPF.

Common Concerns with My Forms

- **Concern: Technology allows anyone to send a completed report to HQDA.**
Response: Designate the process for your organization in an SOP and talk through the process at OPD /NCOPD or staff calls. Be flexible in difficult cases.
- **Concern: Can you delete my reports?** **Response:** Only form originators can delete.
- **Concern: I cannot make changes to my tracking copy.** **Response:** Conduct face-to-face meetings, make telephone calls or email, print & ink copies. You can still recommend changes when you see they are needed even if all you have is an information tracking copy.
- **Concern: Do I need a special proxy? Can I help my senior rater with his/her comments?** **Response:** Provide input to rating officials using a support form or face to face contact. Or, when routing evaluations, you can: (1) put notes in an email message that routes with the document. Only the recipient of the original is able to view these comments, (2) Add information to blocks designated for other rating officials. They must review, delete, change, or accept elements as their own before signing evaluations.
- **Concern: When is HRC going to make everybody use this system?** **Response:** Throughout 2007 we will implement many evaluation initiatives – all of which support or are enhanced by this system. Rating officials get the most tracking, accountability, speed, and accuracy using wizard forms, digital signatures, and My Forms routing and submission for the least cost. Formflow will be terminated by Army Publishing at some point.

Evaluation System Office Goals

- **100% Accountability** (knowing where a report is at all times)
- **100% Accuracy** (in content and processing)
- **Speed through the system** (from THRU date to OMPF)
- **One Army standard** (policy, procedures, access for information and submission)

From these goals our initiatives and actions
fall ...

Eval Information Sources

1. AR 623-3 and DA PAM 623-3
2. AKO My Forms wizard form formats
3. Evaluation Systems Office homepage:
<https://www.hrc.army.mil/site/active/tagd/MSD/ESO/eso.htm>
4. Online applications and tools - IWRS for AC OER, AC NCOER reports, 2x Citizen reports, & GKO reports for ARNG.
5. Human Resources Command offices:
 - **Policy:** (703) 325-9660 (DSN: 221),
tapcmse@conus.army.mil
 - **Appeals & Corrections:** (703) 325-8642 (DSN: 221)
 - **If not able to get online, SR Profiles (& currently working an initiative to combine):**
 - **Active & USAR (703) 325-9660 (DSN:221),**